

**EASYVISTA™**

**3-PART SERIES**

**REAPING THE REWARDS OF IT  
FUNDAMENTALS WITH **BARCLAY RAE****



**EPISODE 3:**

November 29 2023 at 4pm BST, 11am EST

**SAVE YOUR SEAT**

**EASYVISTA™**

  
**BARCLAYRAE**  
Independent Management Consultant

# EASYVISTA™



## Easy-Vista Webinars Episode 3

Bringing ITSM Fundamentals  
And Futures together



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# 3 Webinar Series

**EASYVISTA™**

**13<sup>th</sup> September**

**Episode 1 – Futures and Ai opportunities**

**11<sup>th</sup> October**

**Episode 2 – ITSM Fundamentals**

**29<sup>th</sup> November**

**Episode 3 – Bringing Fundamentals and  
Futures together**

# Presenter – Barclay Rae

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**ITSM Consultant and author since 1994**

**Over 700 Service Transformation Projects across all sectors**

- *itSMF UK Paul Rappaport lifetime achievement award recipient*
- *ITIL4 architect team – co-author *ITIL Practitioner, ITIL4 Foundation**
- *Lead Editor ITIL4 *Create Deliver and Support**
- *itSMF UK CEO 2015 – 18, Director 2015 – 2020*
- *SDI Associate, auditor*
- *Co-author SDI *Service Desk Certification standard**
- *Author of *ITSM Goodness**
- *Senior Advisor, ITIL, PeopleCert*
- *Service Management Principal (UK), CDW*
- *HDI top 25 ‘Thought Leader’*



# Agenda



**1 ITSM value**

**2 Recap - AI and Fundamentals**

**3 Bringing it together:**

- **Purpose**
- **People**
- **Preparedness / Readiness**

**4 Summary**

# ITSM Value

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# The value of Service Management

## Collaboration



**HOW WE ENGAGE AND WORK WITH COLLEAGUES, USERS, CUSTOMERS AND PARTNERS**

## Business focus



**THE WAY THAT WE WORK TO MEET BUSINESS NEEDS, DEMONSTRATE VALUE, DEVELOP OUR VALUE STREAMS AND MANAGE COMPLEXITY, USE TOOLS AND WORK PRACTICES TO DELIVER PRODUCTS AND SERVICES**

## Assurance



**THE APPROACH THAT WE TAKE TO MANAGING RISK, ACCOUNTABILITY, TIME-TO-MARKET, AND EFFICIENCY**

## Innovation



**HOW WE DEVELOP NEW AND UPDATED PRODUCTS AND SERVICES TO DELIVER BUSINESS OUTCOMES – BOTH FROM DESIGN AND BUILD TO RUN AND SUPPORT**

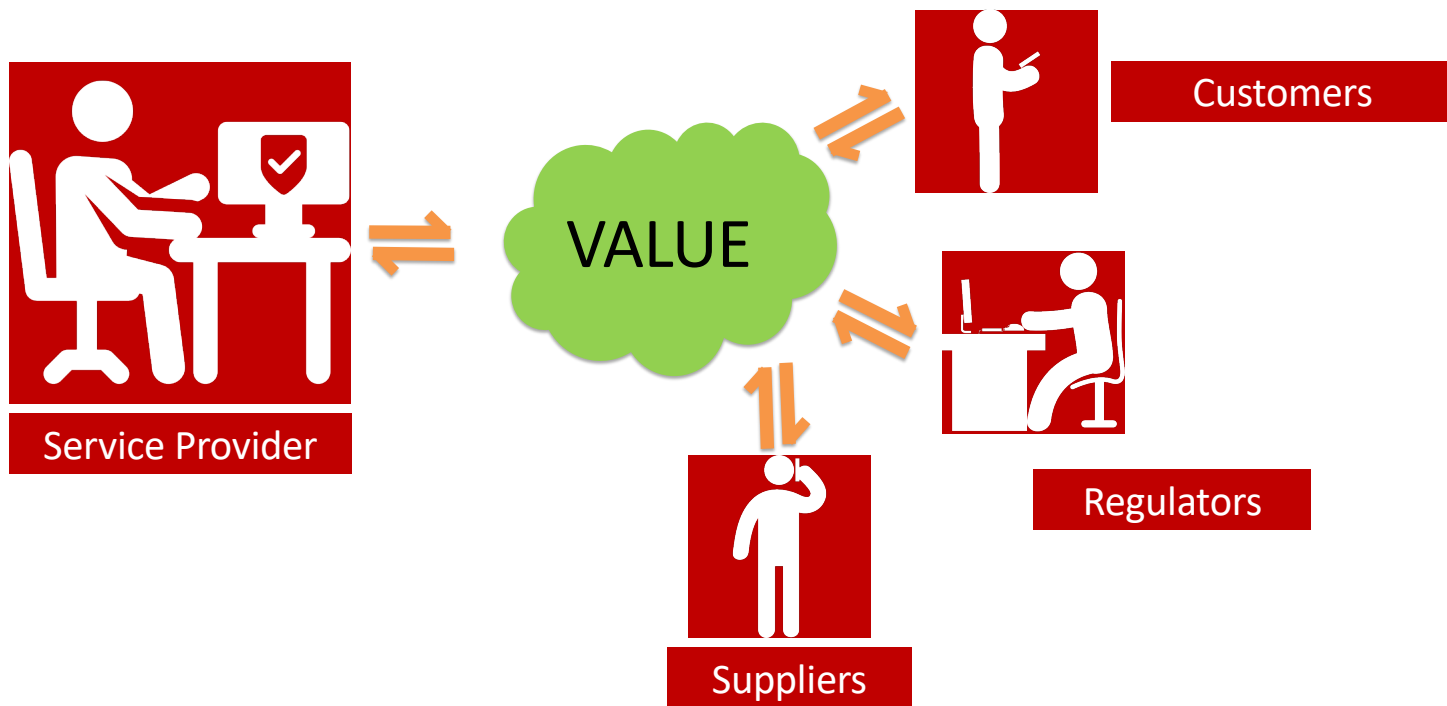
## Governance



**HOW WE ACCOUNT FOR AND SAFEGUARD THE KNOWLEDGE RESOURCES OF OUR CUSTOMERS – PARTICULARLY WITH CLOUD AND DISTRIBUTED MODELS.**

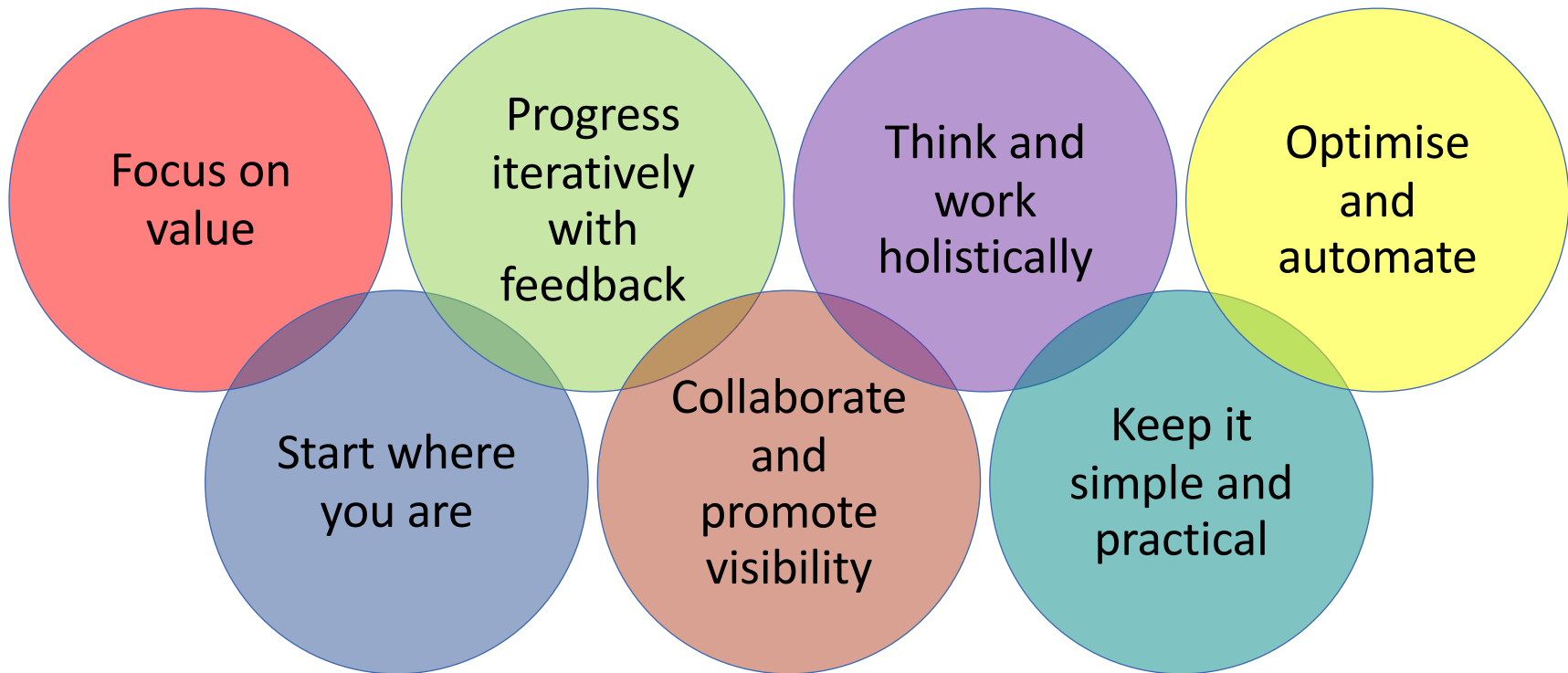
## 'Co-Creating' Value

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# Guiding Principles



# Mindset



# AI Capabilities

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# ITSM and AI

The potential for AI is significant

- Improve the customer experience
- Improve services in meaningful ways for business
- Shift the IT workforce from repetitive transactional work to innovative and creative work

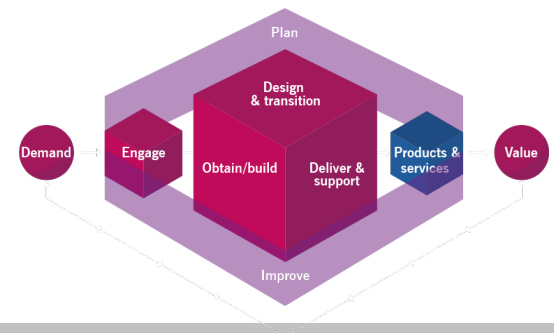


# AI and ITSM

Many organizations are already benefitting from using AI in their service management practices

Using machine learning and natural language processing, organizations can

- improve the management of events, requests, incidents, and problems
- improve the overall customer experience
- Collect data about our services, customer requirements, & end-user issues and solutions
- Develop systems that utilize AI to drive improvements to service design, delivery, & support
- Make data-driven judgements and decisions based on pattern recognition across multiple channels and systems



Applying AI to ITSM

# AI and Knowledge Management



- **Businesses are increasingly accumulating massive amounts of unstructured data** - in images, documents, audio, video, and other data files where traditional analytical methods are not as effective
- Organizations can use machine learning and natural language processing to find patterns and derive insights from unstructured data where it was impossible to do so in the past
- AI can be used to auto create knowledge articles from data, suggest articles for human intervention or use, and even suggest knowledge articles directly to customers through self-service

# AI and Knowledge Management



- **Businesses are increasingly accumulating massive amounts of unstructured data** in images, documents, audio, video, and other data files where traditional analytical methods are not as effective

*Organizations can use this data to support business decisions*

- *IBM's Watson uses natural language processing (NLP) to analyze and gain insights from large volumes of unstructured data in many different vertical markets*

# Incident Management

- **In the early stages of adoption, AI is most often used to improve**

Incident categorization

Issue prioritization

Pattern recognition for commonly occurring incidents

Auto resolution of incidents

Workforce optimization

- It is important to ensure that data in the incident management practice is structured consistently and properly maintained – user data, CIs/CMDB, Knowledge



# Incident Management

- In the early stages of adoption, AI is most often used to improve
  - Incident categorization
  - Issue prioritization
  - Pattern recognition for commonly occurring incidents
  - Auto resolution of incidents
  - Workforce optimization

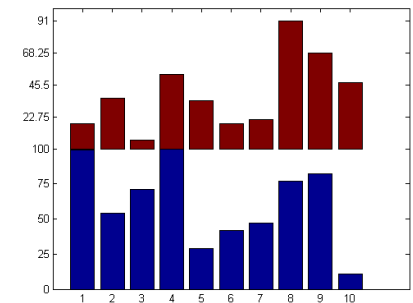
## Example

- *Artificial intelligence can help to identify a resolution for a customer query by*
- *(1) using natural language processing to understand the intent of the customer query and (2) matching it to solutions stored in the knowledge base.*
- *In many cases, solutions can be automated, thus reducing the need for any human intervention.*

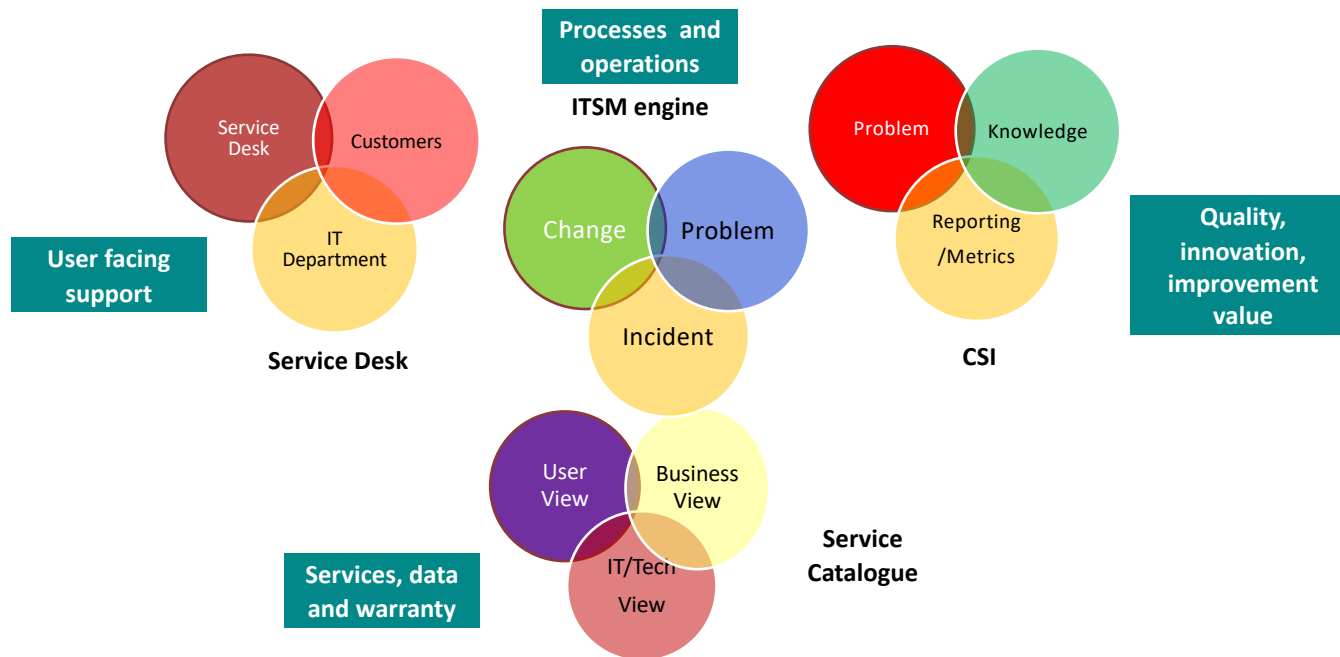
# Key practices/fundamentals

# Key questions

- Are we working together towards shared business objectives?
- Are our cross functional teams working effectively?
- Are our people happy / well treated?
- Do we understand what our users/customers feel and experience when using the services?
- Do our processes and practices work towards achieving the best outcomes ?
- How do we measure and present our performance?
- Are we measuring the right things?
- Are we presenting and demonstrating about value?



# Core ITSM elements



# Core Practices – Service Catalogue

## ***START FROM HERE***

***Define and document your services, what these deliver to users and what you need to deliver them***

Your system, tools, data and people will appreciate this – eventually.

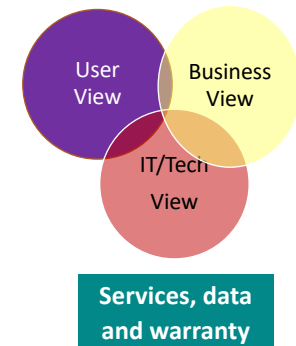
SC supports improved Service desk support, as well as automation...

SC is essential as a model for knowledge and reporting/MI

SC supports mapping and visualisation of services and assets

SC is key for developing business-focused cost models

SC is the centre piece (live services) of a portfolio model



# Core Practices – Service Desk

## *The image of IT and shop window, the flagship, the firefighters*

Need resources and support – experience, skills, capabilities, access, tools, visible support, appreciation, respect...

Provide the marketing and sales operation for IT/Technology

Usually understand the business and users

Don't get out much

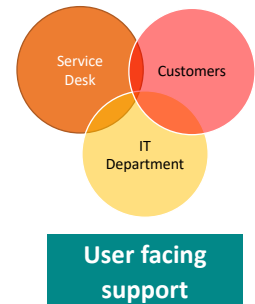
Should be involved...early

The focal point of ITSM

Shift left

Support models – tiered v swarmed

Everyone is part of the service desk... That's YOU too!



# Core Practices – ITSM Engine

## ***Incident, problem, change, config, SLM, knowledge, request***

Mostly provided via the tools

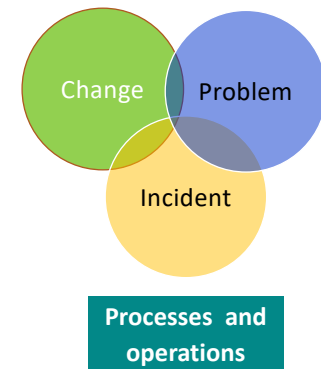
Provide assurance, consistency, audit trail, real-time actionable support

All deliver value on their own – integration and synergy offer compound value

Underlying data is key – what are your specific inputs and outputs..?

Don't all need to be used – certainly not all at once.

Need collaboration across the organisation – not just *'oh that's service desk'*



# Core Practices – CSI

*Where quality and change, improvement happens – the game changer*

Metrics and data analysis – develop trends and identify areas for improvement

Problem management – turning curiosity and nagging into a structured process...!?  
To improve service and CX/reduce incidents, improve efficiency and quality,  
reduce risks, reduce costs..

Knowledge – turn your data into useful time and cost saving resources  
Needs measurement, needs definition for audience and context





# Bringing it together

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# Essentials...



**Purpose**

**People**

**Preparedness / Readiness**

# ITSM Critical Success Factors



## Purpose

The Why...

- Leadership vision and strategy – what are we trying to achieve?
- Clarity on direction and expectations
- Engagement and involvement of stakeholders - communications
- What is the governance..? Risk?
- Feasibility and decision making

# People and Culture?

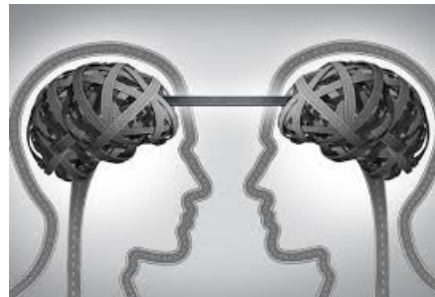
People Organisations Governance Management Ownership



<b>Direction</b>	Clear goals, principles, measurable objectives, culture, vision/mission, measures of success
<b>Trust</b>	Given, taken, courage, vulnerability, mutual professional respect, debate not conflict
<b>Safety</b>	Safe to fail, improvement culture, ethical approach, willingness to call out issues people focus, CSR
<b>Outcomes</b>	Clear expectations, are they being met? Open accountability, WDSL?
<b>Mix</b>	Blend, diversity, experience levels, focus levels, different roles and capabilities

# What we do

- We support people not just technology
- Success depends on our ability to interact productively, positively and professionally
- This involves collaboration:
  - Between people
  - Across teams and IT departments
  - Beyond IT departments
  - With partners



Communication is a 2-way process



We are all communicating all the time



There is no single way of communicating



Timing and frequency matter



The message is in the medium

# ITSM Critical Success Factors



## People

- 'Happiness'
- Employee experience
- Culture – how we do things...
- OCM
- Communications and Engagement
- Neurodiversity
- Well-being

# ITSM Critical Success Factors



## Preparedness

- Leadership support – visible, financial, verbal, directional
- Critical planning – operational and tactical
- Organisational Change management
- Governance and risk - appetite and planning
- Design and mapping
- Skills and resources – what do we need – what do we have available?
- Sensible/realistic phasing
- Stakeholder engagement – across teams, users/customers, partners, leadership
- Workshops, checklists, action plans, testing plans
- Good focus on data and outputs – not just processes and inputs
- Pragmatic use of tools and frameworks...



# ITSM Challenges



**Tools and models, frameworks alone don't deliver successful service management**

Collaboration and 'joined up' **end-to-end** thinking are needed for success.

To prepare - data and processes must be robust and accurate – Knowledge, CMDB, practice/workflow documentation

Usually this will require some changes for all teams in how they do their work.

The 'why' must be clear to all...

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# Thank You



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[bjr@barclayrae.com](mailto:bjr@barclayrae.com)

## The 7 Steps to ITSM Goodness

### **1 Engage and listen to customers**

Start by trying to understand the customer experience and expectation of IT

### **2 Build a service structure based on business outcomes**

Services trump SLAs, so build a picture of what you are delivering across IT

### **3 Invest in the service desk, the focal point and flagship of IT**

It needs quality and investment to make it work for the whole of IT

### **4 Get Problem Management working**

This is the game changer that most organizations still struggle with. It requires the right person more than a good process

### **5 Report on the useful stuff**

Stop producing piles of reports; report on services and on what's important for the customer and business (not what IT does)

### **6 Get all of IT working together**

It's not just about the service desk; everyone must play a part and this needs to be made clear and managed with governance

### **7 Change and sell the pitch**

Success needs to be communicated and marketed – continuously

7 steps	What?	Current State	Future planned	Practical Steps
<b>Engage + Listen</b>	BRM, CX, SLA, XLM, Value definitions, outcomes			
<b>Define + Map</b>	SLA, XLA, KPI, Service catalogue, CMDB, value streams			
<b>Structure + Invest</b>	Service Desk, service model, automation, tools, capabilities			
<b>Create + Manage</b>	Integrated process /practices, problem, CSI, ITSM			
<b>Produce + use</b>	Reporting, Data analysis, dashboard, infographics, Value Demonstration			
<b>Build + Lead</b>	Project, management, collaboration, teamwork			
<b>Commun</b>	Communications and PR, Messaging, culture,			

# ITSM Tools



## IT Service Management Toolsets

- Give you proven ITSM processes and capabilities
- Provide good platforms for improved CX and engagement – e.g. via portals and automation
- And more...

## But they...

- Don't solve your culture problems – unless you've got good OCM
- Require your input and organisational data – and services
- Should be implemented in phases
- Need good levels of integration
- Need support and maintenance – e.g. the SC or CMDB/SACMDB are never finished...
- Need preparation and readiness to get the best results

# Frameworks and models

**ITIL**

**BRM**

**SDI/HDI...**

**Devops, SRE, Agile**

**COBIT**

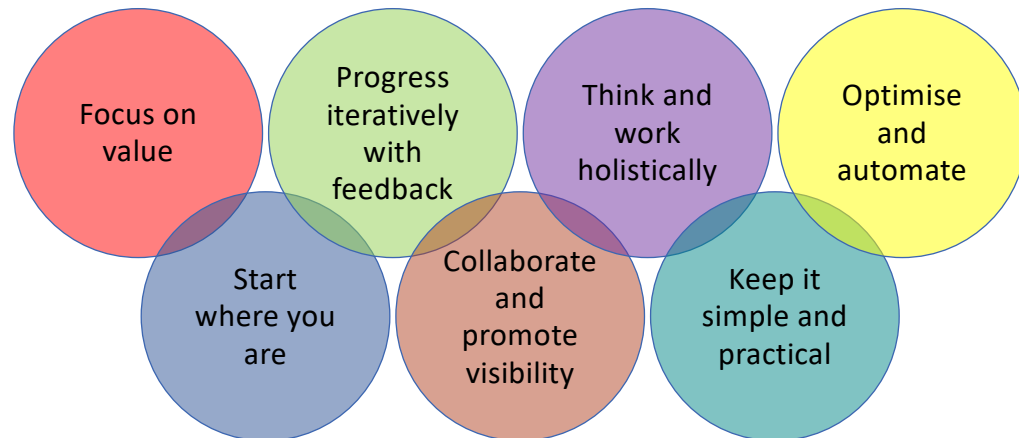
**FITSM**

**SIAM**

**Verism**

**Experience Management**

**Standards, ISO 20K etc..**



## 5 (dys)functions of a team - Lencioni



*5 dysfunctions of a team. Patrick Lencioni*